

# **COALITIONS OF TRADE UNIONS AND SOCIAL MOVEMENTS IN POLAND: TOWARDS REVITALIZATION OF ORGANIZED LABOR?**

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## Abstract

The system of industrial relations in Poland is generally closer to the pluralist than corporatist type. Few mechanisms of extending influence through bodies of collective interest representation are available to trade unions. Therefore, there are grounds to expect Polish trade unions to revitalize through building coalitions with social movements. In this thesis I assess whether Polish trade unions are on the path of revitalization by investigating five different modes of union-movement coexistence. I look at joint association of members, permanent and discrete cooperation, learning by trade unions from social movements, active and passive outsourcing by trade unions, and ignoring of the social movements by the labor organizations. By building a statistical model I come to the conclusion that there are very limited overlaps in the groups of union members and civic activists. Results of the interviews I conducted also demonstrate that large trade unions are hindered in building coalitions with social movements by the legacies of their politicization in the 1990s. Smaller and less centralized trade unions are more successful in it. Simultaneously, availability of the European structural funds is promising for future developments. Generally, I find very few signs of labor organizations forming coalitions with social movements or of the existing connections being conducive to union revitalization.

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## INTRODUCTION

Little seems to have changed at the Gdansk Shipyard, once the site of breathtaking events of 1980-81 including the birth of Solidarity. A modest memorial next to the entrance is separated from the industrial area by a fence and reminds us of the glorious times to the workers routinely hurrying to and from work. Similarly to the Gdansk Shipyard, Solidarity is now one union among many in Poland and its glorious history is what makes it stand out more than anything else. Solidarity is now not the same as it used to be and currently has about 800,000 members compared to 10 million in 1980. Moreover, Solidarity is not the only Polish trade union in such a dire condition. The most recent assessment of the Polish industrial relations found union density not exceeding 15%. (EIRO 2007) Added to that is the prominence of the enterprise-level collective bargaining, which weakens the unions even further. A call for revitalization originated from this weakness of the organized labor in Poland. More recent accounts of unions' new recruitment strategies among teachers and nurses, and in such sectors of Polish economy as supermarkets and banking, are well documented but present an area of controversy. Some could see in this a sign of a "modest revival" (Hardy, n.d.) while others are more cautious in their evaluations (Ost 2002, 46-48; 2005, 176). Both agree, however, that the changes started happening after 2001, when trade union leaders realized that a breakup with political parties and revitalization efforts are necessary.

The aim of this research is to assess whether there is evidence of revitalization of the Polish trade unions on the basis of coalitions of organized labor and social movements. In this thesis I will critically examine suggestions of Hardy (n.d.) that 'community unionism' has been adopted by the Polish trade unions and is contributing to their revival. I will test such a claim by providing an overview of existing connections between the organized labor and

community associations and social movements. Simultaneously, I will assess whether and how Polish trade unions go beyond traditional economic unionism, which is advocated for by Ost (2002) as the only way for the unions to regain force.

In the first chapter I begin by acknowledging that unions have different mechanisms of extending their influence in different systems of industrial relations. Bodies of collective interest representation are effective mechanisms of extending influence available to the unions in the corporatist systems. At the same time, pluralist systems require the unions to extend their membership base and influence, which can be achieved by building coalitions with such other collective actors as social movements or community associations. By drawing evidence from statistical data and previous research, I demonstrate that the case of Poland resembles more closely a pluralist rather than a corporatist system of industrial relations. This allows me to claim that revitalization of the Polish organized labor should be expected to follow the path suggested for the pluralist systems. This path has been described by Bacarro, Hamann and Turner (2003) as coalition building with social movements and resembles what other researchers labeled as social movement unionism (Nissen 2003; Bronfenbrenner et al. 1998; Bronfenbrenner and Juravich 1998).

I conclude the theoretical part of my research by developing a typology of modes of union-movement coexistence. This typology originates from the connections of social movement and organization theories (Davis et al. 2005; Campbell 2002) and crucial differences of social movement and economic models of unionism. I construct the typology on the overlaps of the constituencies, goals and methods/repertoires of the unions and social movements. According to this typology, I differentiate between joint association of people with trade unions and civic groups; permanent and discrete cooperation; learning by the unions from the social

movements; active and passive outsourcing by the unions; and ignoring of social movements by labor organizations. In the empirical part, comprised of two chapters, I look for the signs of these modes of coexistence. I focus on two largest trade unions in Poland – NSZZ “Solidarnosc” (Solidarity) and Ogólnopolskie Porozumienie Związków Zawodowych (OPZZ) – and will look at the smaller unions for comparative purposes.

I use several methods to gather and evaluate the empirical data. Generally, my research is based on a combination of quantitative analysis of statistical data and qualitative evaluations of the interview materials. There is a connection between the two methods as the statistical model I devise contains those variables that were also addressed during the interviews. A similar research design is described by Tashakkori and Tedlie. (1998, 144 – 145) A particular type of a statistical model that I choose makes analysis of both cardinal and ordinal quantitative data possible.

The most suitable technique for working with data sets combining cardinal and ordinal quantitative parameters and a binary dependent variable is a bivariate logistic regression. Statistically significant estimates of the regression were addressed during the interviews that followed. Results of the statistical modeling are presented in the second chapter and are to the materials that I collected in Poland during a series of semi-structured interviews with NGO experts, members and leaders of the NGOs and trade unions.

The second chapter uses statistical data and is devoted to testing for the possibilities of the simultaneous involvement of people into both trade unionism and civic activism. I build a statistical model to assess the proximity of the personal traits of the two groups of people: those belonging to the trade unions and the ones having taken civic actions in the recent past.

I look at the socio-demographic factors, salience of the public issues and personal values of the individuals. Testing for the proximity of the personal traits will allow me to evaluate potential of an overlap in social networks of trade union members and civic activists. I will conclude that those few traits that trade union members and civic activists have in common are not sufficient for joint association to take place.

In chapter 3 I first assess conditions that need to be fulfilled for cooperation of any kind to exist. This is followed by analysis of cases of union-movement coexistence under each of the modes of the proposed typology, which lets me evaluate whether there are signs of particular modes of union-movement coexistence contributing to the revitalization of organized labor in Poland. After reporting cases for each of these modes, I summarize my findings paying special attention to the factors that have an impact on several modes of union-movement coexistence. In particular, I argue that openness of both NGOs and large trade unions to the contacts with other actors is very low. Moreover, I claim that large trade unions seem to suffer from the history of their politicization in several ways. In particular, my argument is that legacies of union politicization in the 1990s make NGOs question the motivations of the trade unions when these engage in civic activism. Additionally, I highlight how the availability of the structural funds of the European Union makes a difference in the way Polish trade unions and social movements interact. I conclude by claiming that small trade unions come closest to installing fruitful cooperation with social movements but are too weak to benefit from it. Simultaneously, I will find OPZZ more capable of social movement unionism than Solidarity.

Empirical investigation makes it clear that not all of these modes are currently conducive to union revitalization. Quite evidently, passive outsourcing of some of the function by the trade



unions and ignoring of the social movements altogether are not the ways by which the unions can benefit their members. Moreover, even learning can be of little importance if the learned methods are not applied for the advantage of the workers. Cases of cooperation between the unions and social movements could also be more related to the interests of the workers. I finish by suggesting several questions to be addressed in future research.

## CHAPTER 1: WHICH MODE OF UNION REVITALIZATION FOR POLAND?

Union decline in many countries of the world does not come as a surprise any longer. Decrease in union density and activism has been well documented, as have attempts to analyze causes of it. (Western 1995; Ebbinghaus and Visser 1999; Martin and Ross 1999; Machin 2000) Discussions of union decline have been recently turned from describing causes to attempts to come up with possible solutions. In search of these, authors turn to building upon the analysis of divergent systems of industrial relations. In this chapter I will first explain why different modes of union revitalization can be expected in different systems of industrial relations. I will then draw distinctions between pluralism and corporatism so that to demonstrate on the basis of statistical data that Poland has a pluralist system of industrial relations. I will then develop a specific understanding of social movement unionism as a way of union revitalization for this particular system of industrial relations. On the basis of this understanding and social movement theory I will develop a typology of the modes of union-movement coexistence. This typology will serve as a basis for the empirical investigation that will follow in the subsequent chapters.

### ***Union Revitalization: Different Strategies for Different Systems***

When searching for the different ways, in which trade unions can be revitalized, Frege and Kelly (2003) develop a framework that takes ‘strategic choice’ of the union as a variable dependent on the way unions perceive and frame changes in the environment. In this manner the authors employ social movement theory in their discussion of industrial relations. Five case studies for individual countries that follow Frege and Kelly’s (2003) framework enable Baccaro, Hamann and Turner (2003) to draw conclusions on the variety of strategies available for union revitalization in countries with different systems of industrial relations.

Baccaro, Hamann and Turner (2003) observe that there is a clear distinction between the countries where unions are continuously involved in social partnership and the ones where unions are engaged in a pluralist system of industrial relations. The authors find a distinction rooted in one major factor: extent of institutional embeddedness of organized labor. Their conclusions can be summarized as follows: in the conditions of institutionalized social partnership, unions need to rely less at their membership base and, therefore, neither revert to the enlarging it nor seek coalitions with other groups in their attempts of revitalization. In other words, extending the influence through the institutionalized mechanisms of representation does not require the unions to prove their strengths by flexing the muscle of membership. It is for the pluralist systems of industrial relations that the authors demonstrate how unions embrace the idea of revitalization through organizing and social movement unionism. (Baccaro, Hamann and Turner 2003, 128) Relying on the wide membership base becomes more important when unions do not possess an automatically strong position at the bargaining table. There are two mechanisms of extending the membership base when unions are weak and are not embedded in the decision-making bodies: a direct measure of organizing the unorganized, and an indirect way of seeking wider popular support by building coalitions in the communities and with social movements. Findings of Baccaro, Hamann and Turner (2003) are, in principle, generalizable for the countries of Central and Eastern Europe as the authors make no specific assumptions.

Testing these suggestions for the case of Central and Eastern Europe is a relevant task – the decline of the unions is as apparent in this region as it is elsewhere. Moreover, cases that resemble both systems of industrial relations can be found among the countries of the region. Drawing conclusions for several countries is an extensive task and in this research I will focus on the particular case of Poland. In this chapter I will first refine theoretical grounds by

comparing the pluralist (liberal) and corporatist systems of industrial relations. This will be followed by a consideration of sets of factors that allow to differentiate between divergent types of systems. The discussion will become less abstract when I apply data to determine which side Poland belongs to. These findings will allow me to closely tie my research question to the suggestions formulated by Baccaro, Hamann and Turner (2003).

### ***Systems of Industrial Relations: Case of Poland***

No matter how much social scientists would like to go beyond dichotomies in describing social phenomena, presenting cases in such a way is often a convenient method to highlight and contrast the differences. In this section I will briefly survey distinctions between two ideal types of industrial relations. I will attempt to describe basic differences between clusters of corporatist and pluralist systems of industrial relations. An examination of what exactly analysts mean when discussing a corporatist mode of interest representation in industrial relations as opposed to a pluralist one will allow me to take a side in the lasting debates on whether the post-socialist economy of Poland developed corporatist structures. (Iankova 1998; Ost 2000) This discussion will highlight several criteria against which I will later assess the case of Poland explore its proximity to one or another ideal type

To use an established theoretical ground for a brief comparison of corporatism and pluralism, I suggest using Schmitter's widely accepted definitions of the two terms. Without relating the concept to specific ideologies, political regimes or presence of religious, linguistic or other cleavages, Schmitter proposes to understand a distinction between corporatism and pluralism by looking at the nature of units of collective interest representation and their relations between themselves and with the state. (1974, 93-94, 96) Importantly, corporatism and pluralism are conducive to the "similar outcomes of demand moderation, negotiated

solutions, leader accountability” (Schmitter 1974, 101) but achieve these in different ways. Despite variation in the ways of deliberation, the principal actors involved remain largely the same for pluralist and corporatist systems of industrial relations. The ways, in which they emerge, coexist, interact and arrive at the results of conciliation, matter more.

The major actors in the sphere of industrial relations are employers’ and workers’ associations and the state. In my analysis here I will align with Rogowski that the way of deliberation in industrial relations is negotiation. (2000, 118) Consequently, it is by addressing the properties of negotiation that we can assign systems of industrial relations to particular types.

Several questions can be asked in relation to negotiations. First of all, who are the actors participating in the negotiations? Corporatist modes are characterized by relatively few negotiating parties. This corresponds to Schmitter’s understanding of corporatism as involving a “limited number of . . . functionally differentiated categories . . . granted a deliberate representational monopoly within their respective categories.” (Schmitter 1974, 93 – 94) Pluralist models are characterized by a larger number of spontaneously emerging parties involved in negotiations, each capable of representing a separate group within a broad constituency (“categories” in Schmitter’s terms) of workers or employers. Under the pluralist system of industrial relations a small number of workers and employers can be represented by many organizations.

An estimate of 14.7% is given for the union density in Poland in 1999-2004 with 42.5% for a collective bargaining coverage. (Mykhnenko 2005, 8) EIRO reports slightly different but still low figures – union density is estimated to be 17% in 2004 with collective bargaining

coverage of 35%. (EIRO 2007, 2) In this regard, Mykhnenko's conclusion that labor relations in Poland are "non-confrontational" (2005, 9) can be attributed to the general weakness of the labor organizations rather than to high levels of non-conflictual coordination. The Polish trade unions are fractured and generally are confederations of smaller sectoral or enterprise-level unions. For example, OPZZ, the largest trade union confederation, is comprised of 90 nation-wide trade union organizations. Some members of this confederation – such as ZNP (Teachers' Union) – are enjoying considerable freedoms in deliberation. Solidarity, another major union, is a solitary union comprising members from various sectors. Forum ZZ, the third largest union, has been formed as a loose confederation of nation-wide, sectoral or enterprise-based unions. Low union density also calls for the primary importance of state as a regulating agency. For instance, it actively intervenes in setting the minimum wage standards but leaves further deliberation to employers and workers. (EIRO 2007) Low density of employers' organization – estimated at about 20% for 2004 (EIRO 2007, 2) – reaffirms Poland's proximity to the pluralist system of industrial relations.

A second question is, how broad is the scope of the negotiations? Answering this question will uncover how far the agreements achieved by the workers' and employers' organizations reach. Whether negotiations typically concern the interests of the enterprise, sector or nation-wide groups of workers is characteristic of the system. In pluralist systems the negotiations happen at the lower level compared to the corporatist systems. Enterprise or sectoral-level bargaining is characteristic of the pluralist system, while national or inter-sectoral negotiations are typical for corporatism.

As for the second feature of negotiations (the scope of deliberation), collective bargaining in Poland is reported to be primarily happening at the level of individual enterprises. (EIRO

2007, 3; Mykhnenko 2005, 8) It becomes especially apparent that the low figures for collective bargaining give way to market-like pluralist relations if one notices that about 90% of all the companies do not have any workers' representation. (EIRO 2007, 4) A recently adopted bill, which allows workers' councils to be formed at the enterprises where there is no union representation, might change the situation, but currently the employers possess strong capacities to follow the market in negotiating and establishing the wages. Linked to the issue of the level of collective bargaining is the presence of such coordinating mechanisms involving many of the interested parties as tripartite commissions. This serves as a basis for another question.

Thirdly, do tripartite bodies exist and, if so, how influential are decisions taken by those bodies? Corporatist systems of industrial relations are characterized by presence of tripartite bodies involving employers, employees and the state. Decisions of these bodies cover an extensive share of the interested actors and are taken into consideration. Complementary interdependence of the parties in the negotiations leads to a consensus-oriented decision-making. Tripartite bodies can also exist in the pluralist systems but in that case they can be torn by contradiction and relations between parties can be adverse.

All of the three largest trade unions (OPZZ, Solidarity and Forum ZZ) participate in the tripartite commissions, which could reach only few agreements on restructuring key sectors despite sharp ideological disagreements between the unions in 1997 – 2001. (EIRO 2007, 6) Ost, however, labels the East European practices as “illusory corporatism” (2000) and highlights how “the main task of Poland’s tripartite commission has been to secure labor’s consent to its own marginalization.” (2000, 515) Several authors also highlight how tripartism served to promote a neoliberal agenda in Central and Eastern Europe. (Ost 2000;

Crowley and Ost 2001; Crowley 2004; Heinisch 1999; Kubicek 1999) At the same time, Iankova and Turner (2004) describe how the Polish way to post-communist tripartism involved Solidarity in its capacity of a social movement rather than a trade union and go on to state that Poland “is committed to maintaining and developing tripartite structures.” (Iankova and Turner 2004, 89) I will remark, however, how Solidarity possessed political power and in this went contrary to a traditional understanding of a social movement as an actor putting pressure on the power-holders. Moreover, the times of Solidarity in power were characterized by either absence of tripartite structures (until 1993) or by the conflictual nature of relations within those (as in 1997 and 2001). (EIRO 2007, 6) For these reasons I will not share optimism of Iankova and Turner (2004) and to instead align myself with Mailand and Due, who claim that in Poland (among other countries) “the social dialogue ... has been conducted and rapidly redeveloped through a top-down process” and see little chance for tripartism to become as prominent as in the Western Europe. (Mailand and Due 2004, 195)

A relatively greater independence of the Polish trade unions from the political parties than several years ago decreases the chances of a top-down tripartism. However, even this does not suffice for the social dialogue to be extensive enough: the density of the employees’ and the employers’ organizations is very low. Partly due to the inefficiency of the tripartite commissions, a great deal of legal regulation of the labor process and remuneration is conducted by the state through a detailed Labor Code. These laws are often contested in the tripartite commission, which signifies an adversary type of relations within this body.

Overall, the low union density and enterprise-level collective bargaining point to the conclusion that system of industrial relations in Poland is closer to the pluralist type. The conflictual nature of relations in far from fully representative tripartite commissions is only



reinforcing this finding. However, in the preceding analysis I put the process of negotiation in the center while alternative approaches see take different subjects as crucial. For example, Hall and Soskice (2001) devise a dichotomy of Coordinated and Liberal Market Economies (CMEs and LMEs) by focusing on the firm. The sphere of industrial relation in their analysis is related to the way companies “coordinate bargaining over wages and working conditions with their labor force, the organizations that represent labor, and other employers.” (Hall and Soskice 2001, 7) Though this view prevents us from treating industrial relations as a system going beyond enterprise, it gives some valuable insights. I will now address such dimension of Hall and Soskice’s theory as inter-firm relations. Additionally, I will take a closer look at the way, in which openness of the Polish economy for Foreign Direct Investment (FDI) influences the nature of the industrial relations.

Contacts between firms, which are not represented in the tripartite bodies, do not resemble coordination typical for corporatist systems either. According to Hall and Soskice (2001), in liberal systems firms are typically relying more on the market procedures and contracts enforcing than on the networks of trust and long-term relationships between firms, managers and owners of a more informal nature. Johnson, McMillan and Woodruff (1999) conducted a survey in 1997 in Poland, Slovak Republic, Romania, Russia and the Ukraine that aimed to uncover patterns of contract enforcement in different countries of Central and Eastern Europe. They analyze the role of courts, relational contracting, loyalty and other mechanisms of enforcing contracts. Their findings regarding the court system demonstrate how Polish firms score high in their level of trust that court system is able to resolve individual disputes. The authors explain this by showing that there are few mechanisms of contract enforcing by associations of the firms as only 28.9% of the firms belong to such bodies. (Johnson, McMillan and Woodruff 1999, 42) This correlates with the low 20% reported by EIRO for

employers' organization density for 2004 (EIRO 2007). Prevalence of market relations between the employers goes for the wage-setting procedures has roots in the high figures of unemployment and results of privatization, which made the negotiation of wages a domain of the individual enterprises. (Grosfeld and Nivet 1999; Kabaj 1995)

Another sphere of economic reforms contributing to changes in industrial relation is Poland was opening of the economies of Central and Eastern Europe to the inflow of Foreign Direct Investment (FDI). The issue of possible transfer of industrial relations model from the country of origin to the country of destination through the inflow of FDI touches upon the discussion of systems of industrial relations in Central and Eastern Europe. Consequences of attracting FDI from such distinct countries of origin as the USA and Germany were compared by Marginson and Meardi for the case of Poland. (2004) The authors conclude that "controlling for the size and mode of entry, the findings show no significant difference between US and German investors" in terms of union-tolerance. (Marginson and Meardi 2004, 12) They link a surprisingly low union-tolerance of German multinationals in Poland to a recent discussion of a divergence within a German system of industrial relations. Allegedly, there are two models that are not the same in union-tolerance and are applied at the German enterprises of various sizes at the domestic level. (Bluhm 2003, 4) Fichter et al. (2005) also conclude that the expected transfer of the industrial relations systems from the countries of FDI origin lacks evidence. Their findings relate to the centrality of the host state highlighted by Bandelj, who attracts attention to how "direct engagement of host countries as market agents was a key turning point in the growth of FDI activity." (2003, 8) Specifically for the case of Poland, few reforms in the beginning of the 1990s could contribute to the emergence of the coordinating bodies. However, support given to neoliberal reforms in the beginning of transformation by the trade unions makes it clearer why neither labor-adversary

US investors nor potentially more labor-friendly German multinationals did not need to be union-tolerant in Poland. (Fichter et al. 2005; Marginson and Meardi 2004)

To summarize my discussion of the Polish system of industrial relations I would like to reiterate that union density is low and decreasing, collective bargaining coverage rarely extends beyond the level of enterprises. Combined with adversary relations in the tripartite commissions and low level of employers' representation, this leads me to conclude that the system of industrial relations in Poland is located closer to a liberal than to a corporatist ideal type and corresponds more closely to a set of criteria Schmitter puts forward for the liberal mode. Indeed, a system of interest representation in Poland is characterized by "spontaneous formation, numerical proliferation, horizontal extension and competitive interaction" of the agents of collective interest representation. (Schmitter 1974, 97) This conclusion is reaffirmed by the dominance of market-based, as opposed to trust and loyalty-based, employers' coordination and adoption of pluralist industrial relations patterns even by traditionally union-friendly multinationals.

Based on this conclusion I can now make a suggestion that a way of union revitalization for the liberal systems of industrial relations also relates to Poland. In this regard, the central goal of this research is to test whether there are signs of union revitalization happening in the way that would be expected from a country with a this system of industrial relations. More specifically, I will investigate whether there is evidence of trade unions forming close alliances with social movements or organizing the unorganized in Poland.

I will now briefly consider similarities and differences of Poland and the USA (the most prominent case of a liberal system of industrial relations) so that to better tie my discussion to

the suggestions of Baccaro, Hamann and Turner (2003) I will then briefly describe the concept of social movement unionism as it originated in the USA. This will enable me to formulate a typology of specific forms of collaboration between unions and social movements, which I will follow in the discussion of my empirical findings.

### ***Systems of Industrial Relations: Poland and the USA compared***

Union decline in the USA has been reported since the late 1960s. Decreasing influence of the workers' organizations at the levels of plants and industries led to a total union density of mere 12% by 2006 with around 10% for the private sector in general and slightly more than 8% for the private industry in particular. (BLS 2007) Most of the unionized workers belong to AFL-CIO, a confederation of 54 nation-wide unions. Despite the presence of a consolidated labor organization, the system is characterized by the dominance of a collective bargaining coverage of an exclusive type happening on the single-employer level. (Traxler 1996) Moreover, by now a lot of companies have adopted what Thelen calls a strategy of "human relations/industrial relations" (2001, 92), which recognizes a need for the management to interact with the workers. This interaction, however, often happens without involvement of the unions. Correspondingly, there are by now few hopes that partnership that excited proponents of 'human relations' approach in the 1980s will become institutionalized to involve labor organizations. (Kochan and Osterman 1994)

As I have described above, union density in Poland is not higher than 15% and collective bargaining happens primarily at the level of individual enterprises. However, collective bargaining is of a more inclusive nature than in the USA: note numbers in the range of 35-42%, which are more than double than those of union density. A more inclusive collective bargaining system might be linked to the presence of both major trade unions at the

previously greatly unionized large enterprises. It is doubtful, however, that this inclusion of the non-unionized workers in collectively bargained agreements can go beyond the level of enterprises since, as I have mentioned above, about 90% of the companies do not have any workers' representation. (EIRO 2007, 4) Moreover, Poland might be standing on the path leading to a 'human relations/industrial relations' model similar to the one found in the USA. Recently adopted bill mandates creation of the works councils at all the enterprises of more than 50 employees. According to Czarzasty and Towalski, adoption of the bill was delayed due to the hesitance of both the unions and the employers to proceed with it rapidly – unions were reported to be afraid of losing the monopoly in deliberation and employers were hesitant to back another form of employees' collective representation. (Czarzasty and Towalski 2006) Focus on the small and medium enterprises increases chances of the employers to opt for 'human relations/industrial relations' model and keep the deliberation within the enterprises. The importance of the tripartite commission in Poland might lose grounds to a bilateral system of negotiations typical for the USA. This makes relying on support of other associations that are not bound to individual employers a way for trade unions to increasing their role in the tripartite commissions.

At the same time, collective bargaining in Poland involves more workers' organizations than just a single union confederation as it is in the USA. Moreover, rivalry between three major trade unions often goes beyond the sphere of industrial relations and encompasses political struggles. Affiliations with particular parties were very important during the 1990s and are not rare even now. There are grounds to suggest that personal political ambitions are still an important characteristic of the union leaders in Poland. For instance, according to EIRO, despite refraining from giving support to any party or coalition, prominent leaders of the

Polish trade unions managed to get to Sejm in 2005 through such parties as PO, PiS and SLD. (EIRO 2005)

Despite a difference in the number and relations between trade union organizations, my conclusion is that systems of industrial relation of Poland and the USA are similar. It is especially so in respect to the decrease in union density and a narrow scope of collective bargaining, which are the most important characteristics of the system of industrial relations. I will now outline the emergence of the responses to these conditions in the USA to later assess whether signs of the same development are present in Poland.

### ***Emergence of Social Movement Unionism in the USA***

The dire situation of the labor movement in the USA by the end of the 1980s led academics, labor-affiliated intellectuals and labor organizers to rethink the labor movement in the USA to find the ways to reinvigorate trade unions. Two different ways of thinking that emerged in the 1990s were broadly labeled as Social Movement Unionism and Economic Unionism (sometimes called Value Added Unionism, Business Unionism or Servicing). Nissen (2003) provides an overview of recent analyses of Value Added Unionism (VAU) as opposed to the Social Movement Unionism (SMU). The general distinction that he highlights is about the sources of the workers' interests: VAU centers on economic benefits of the actors, while SMU takes more general notions and conflicts into consideration. Furthermore, business unionism relies often on that "unions must reinvent themselves as value-adding organizations or networks offering positive gains to employers." (Nissen 2003, 134) At the same time, he shows that social movement unionism means that unions are to form coalitions with other social movements around a joint common good. (2003, 141) I will align with such a distinction between SMU and VAU in this research. Correspondingly, I propose using Frege,

Heery and Turner's definition for understanding social movement unionism through coalitions of workers' and community organizations:

Union coalitions involve discrete, intermittent or continuous joint activity in pursuit of shared or common goals between trade unions and other non-labor institutions in civil society, including community, faith, identity, advocacy, welfare and campaigning organizations. (2003, 2)

What seems to be left unattended by adopting this definition is another line of thinking of social movement unionism, which understands it as "organizing the unorganized." (Yates 2004; Heery and Adler 2004) However, such an understanding of SMU can be linked to the proposed definition if unions manage to attract new members by advocating for the wide causes originating from outside enterprises. For example, in a recent contribution to the ongoing debate regarding the fate of the trade unions in Poland, Kennedy makes an interesting claim that the promise for the revival of the unions can originate from defending the marginalized groups. (Kennedy 2007, 87) Considering the excluded groups is interesting for another reason as well: statutes of many unions (and of the Polish trade union "Solidarity" as well) require workers' organizations to fight unemployment and assist the unemployed, pensioners/retirees and the disabled. Considering whether unions turn towards activities including communities of the underprivileged and excluded members of society will allow me to consider both understandings of the social movement unionism. I will, however, keep an approach of 'organizing the unorganized' as a secondary focus to look primarily on the ways of coalition-building between trade unions and social movements.

### ***Typology of modes of coexistence of trade unions and social movements***

In the subsequent chapters I will use my empirical findings to investigate whether coalition-building between trade unions and social movements is happening and can serve as a basis for union revitalization. I investigate five specific forms of union-movement relations. Trade unions will be considered central actors for this discussion. Possible modes of coexistence will include joint association, permanent or discrete cooperation, learning, active and passive outsourcing, ignoring. What needs to be put forward first is that union look for connections with movement because of the need to attract resources that they lack. This follows directly from the logic of Baccaro, Hamann and Turner (2003). However, we can talk of union revitalization only if these attracted resources add capacity to unions' activities that benefit their members.

For the purposes of this research I will use the following definition of a social movement:

A social movement is a mobilizing collective actor, who follows with a certain continuity the objective to bring about, prevent or reverse a fundamental social change, by using variable forms of organization and actions on the basis of high symbolic interaction and low specification of roles. (Raschke 1985, 77)

This definition has also been used by Kröck (2005) in his analysis of interrelations between trade unions and global social movements in Germany. What is important is that this definition allows us to keep both social movement organizations and non-organizational social movements of a purely associational kind. This definition remains in the mainstream of the understanding of social movement and does not contradict the findings of the major theorists.



In developing my typology I used three major characteristics of trade unions and social movements – constituencies, goals and methods/repertoires. The notion of ‘constituencies’ relates to, first of all, who are the people mobilized by social movements or belonging to organizations and, secondly, which specific causes or issues of contention these people mobilize around. When talking about the goals of the unions or social movements I am aware that goals, in the name of which unions or movements act, can sometimes reflect the interests of the leadership without being related to the constituencies. Methods/repertoires refer to the specific ways, in which unions and movements pursue their goals.

Moreover, each one of these three characteristics can be linked to one of three approaches to theorizing social movements. These approaches are resource mobilization, framing and political opportunities. Resource mobilization approach is tied with constituencies. Framing is used for goal-setting through determining what is good or bad for the organization. Political opportunities are tied to changes in the environment, which lead to altering repertoires and methods.

All three approaches (resource mobilization, framing, political opportunities) can be used in similar ways for theorizing both organizations and social movements. A recent volume by Davis et al. (2005) aims to demonstrate precisely this and correlates closely with the insights of Campbell (2002) and Böhm (2006). These findings are of value for my research since I am pursuing a goal of demonstrating connections between precisely these two kinds of actors – trade unions as organizations and social movements of both organizational and non-organizational associational kinds. The typology of these union-movement connections emerges at the overlaps between constituencies, goals and methods.

I see joint association as built upon an overlap of constituencies, which can be thought of as social networks. If the networks are overlapping but are not activated for mobilization, joint association only exists as a mere possibility. According to Campbell, both organizations and social movements rely on social networks in their mobilization efforts. (2002, 20 – 21) This means that trade unions can enhance their connections with social movements by extending their social networks of membership to include movement activists. In line with conclusions of Stryker (1980) and Stryker and Serpe (1982), I will make an important assumption that there needs to be proximity of identities of two individuals for a network to involve both of them. This is similar to the assumption behind Durkheim's concept of 'mechanical solidarity.' In other words, I treat belonging to a network as a social action based on personal identity. This makes testing for possibilities of joint association a task of determining whether identities of the union members and civic activists are close enough. My method of doing this is building a bivariate logistic regression on the same set of personal traits for such dependent variables as union membership and having taken civic action in the recent past.

I will group independent variables used in the statistical model in three clusters – socio-demographic characteristics, salience of issues of public contention and personal values. Adding variables related to values and opinions on specific issues into the model makes it possible to supplement findings of the quantitative analysis by the materials of the interviews with experts and leaders and members of trade unions and civic associations. By doing this, I will go beyond answering a yes-or-no question of whether union members and civic activists have the same socio-demographic traits to map out those issues and values, over which a greater proximity of identities can exist. These conclusions will be useful for the analysis of the other modes of coexistence.

I will then consider coalitions that can be built through permanent or discrete cooperation between trade unions and civic associations. These alliances can happen over the range of issues and causes, involve different constituencies and take different organizational forms. This discussion will focus on testing a major precondition for cooperation that parties need to be open for it, see a value in it and be technically able to join forces. Such openness for cooperation results from a recognized overlap in goals, methods and, though not necessarily, constituencies. Existence of an overlap in goals refers to the similarity in framing. In other words, for a cooperation to exist, unions and movements need to perceive interests of their overlapping constituencies as related. However, only ideally an overlap in goals assumes constituencies (as the bearers of the interests) to overlap as well. It is often leaders who make conclusions related to cooperation and in that case an overlap in the interests of the rank-and-file is not required and can be reduced to an overlap in the interests of the elites. The third factor contributing to cooperation is an overlap in methods/repertoires, which is important for the unions and movements to be capable of cooperating in practice. I will differentiate between permanent and sporadic cooperation on the basis of its continuity. This distinction is rather technical and is needed only for the purpose of demonstrating whether discrete cooperation can become permanent.

I will then consider whether, how and what exactly trade unions learn from social movements. This mode of coexistence results from the similarity in the ways organizations and movements can respond to the opportunities emerging in the environment. Campbell highlights that social movement theorists “have shown that political opportunity structures [the environment] affect the strategy, organizational structure, and ultimate success of social movements” and claims that the same is true for the organizations. (2002, 4) I see learning on the part of the movements as resulting from recognition of the greater successes of the

movements in utilizing emerging opportunities. Learning, therefore, can happen even in those cases when unions and movements are engaged with different constituencies or have divergent goals. In discussing the process of learning I will be especially interested in highlighting both specific learned practices and such changes in conditions, which proved conducive to learning.

I will then turn to less optimistic cases of union-movement coexistence. I will take a closer look at the cases when unions can move out of specific fields of activity for the social movements to overtake. Here I will distinguish between active and passive outsourcing. I will understand active outsourcing as a conscious withdrawal of the union from a specific sphere of activity while being aware of the existence of a social movement ready to overtake this sphere. Since the same categories of people can be serviced by the unions and the movements, active outsourcing presumes an overlap between unions' and movements' constituencies. Moreover, since both unions and movements act for the benefit of the same constituencies, active outsourcing also includes an overlap in their goals. However, outsourcing happens precisely for a reason that there is no sufficient proximity in methods – the unions are not strong enough to take care of particular constituencies and outsource it to the social movements.

The notion of passive outsourcing will comprise both unconscious withdrawal of a trade union from a particular sphere and intended termination of activities in a particular sphere without having a specific actor to overtake these activities. Passive outsourcing is linked to a possibility of unions and movements having overlapping constituencies without proximity in goals or repertoires. The last mode of union-movement coexistence is ignoring, which is self-

explanatory as a category and results from failing to recognize existing overlaps or having none of those.

Not all of these modes of coexistence are conducive to union revitalization. The strength of the unions can be best enhanced by joint association, less so by cooperation and even less by active outsourcing. Learning can also empower the unions but will be considered as conducive to revitalization if the learned methods are of value for the union members. Passive outsourcing and ignoring are not linked to union revitalization and signal a contrary trend.

## CHAPTER 2: EMPIRICAL ASSESSMENT OF POSSIBILITIES OF JOINT

### ASSOCIATION

In this chapter I will try to answer the following question: Does the same set of explanatory variables have similar power to predict both TU membership and having taken civic action? As I have made an assumption that social networks involve people with sufficient proximity in traits, answering this question will allow me to evaluate chances of simultaneous association of people with social movements and trade unions. I will focus on investigating the profiles of two groups in Polish society: those who declare their belonging to trade unions and those who have taken action in at least one of the following forms: contacting politician or government official; working in the political party, action group or another organization or association; wearing campaign badge/sticker; signing petition; taking part in lawful demonstration or boycotting certain products.

#### ***Methodology, Model Design and Expectations***

I would like to make two clarifications at this point. First of all, in my research I will not be interested in uncovering whether there actually exist people who both belong to trade unions and have taken civic actions. Nor will I be concerned with how many they are. Instead, I will pursue a goal of understanding whether the same factors related to traits of individuals could explain both having taken civic action and being a member of the trade union. In here, 'having take civic action' and 'being a member of the trade union' are categories not necessarily related to the concrete personalities. They are just abstract classes, to which individual can either belong or not.

Secondly, I recognize that taking civic action is not necessarily the same as participating in a social movement since civic action can take a form of both individual and collective action.

Some of the civic actions, which are included in my analysis, are of an individual nature. However, they are only individual in what concerns action itself. Individuals get to the point of acting through the networks, to which they belong and, as I have described above, my investigation of the joint association relies on the equal importance of the mobilization through social networks for organizations (trade unions) and social movements. My assumption is that people belong to particular networks on the basis of their personal identities. Since personal traits are central for this analysis, it is not really important whether networks, to which an individual belongs are conducive to individual or collective action. Individual traits of persons acting collectively or individually are equally important. These traits can be operationalized by variables of both qualitative (attitudes, income group, etc.) and quantitative (age, years of education, etc.) kinds.

My expectation is that belonging to a trade union and having taken a civic action will be similarly predicted by the same group of explanatory factors. This expectation is twofold. First of all, two models with the same independent variables and dependent variables should display proximity in the predictive power – a sufficiently large number of cases should be predicted correctly in both of them. Secondly, a sufficient number of the same independent variables need to contribute in the same way (direction of influence and the scalar value). I expect both of these expectations be fulfilled to conclude that there is a possibility for joint association between social movements and trade unions.

I will use cumulative results of European Social Survey (ESS) for 2002 and 2004 which gives me the total of 3826 cases. A large number of cases allowed me to include as many as 59 independent variables without concerns for the degrees of freedom. Each of the factors that are expected to describe an individual taking civic action and explain TU membership

were approximated by one or several of the independent variables. The independent variables cover such factors as socio-economic profile of an individual, level of involvement with political issues, personal beliefs and values. Such additional variables as attitudes to specific issues and personal traits, and trust in various institutions that seemed relevant were also included. Independent variables were selected on the basis of conclusions reached by D'Art and Turner (2007) for the links between political participation and trade union membership. Results of Glinski (2004) concerning the role of socio-economic factors and of Campbell (2006) for the impact of education on civic activism were also useful. Very few researchers focus specifically on Poland but several of them consider it among other countries in their quantitative assessments of civil society.<sup>1</sup> Both rounds of the ESS included questions related to the occupation, union membership, position within the enterprise and subjective respondents' evaluation of his/her well-being. Some of the answers are more easily quantifiable than others. Responses to the questions of the qualitative kind are coded in the ESS in the way that allowed their inclusion in the model.

Without going into detail about findings for each of the independent variables, I will highlight the most significant ones and will comment on those that turned out to be insignificant even though they were expected to contribute. The drawback of this statistical model is its inability to track issues that might be conducive for closer links between social movements and trade unions. I will make an attempt to uncover these areas by the means of supplementing statistical analysis by qualitative data from the interviews. After evaluating

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<sup>1</sup> See, for example, Whiteley (2005) for the evaluation of the factor of age in public and civic activism.



the general quality of the model, I will discuss findings related to particular variables. I will look at two models at once.

### ***General Empirical Findings***

First of all, a general test for collinearity shows VIF's higher than the critical value of 2.5 only for years and level of education, which could be expected. However, we need both variables. Another general remark on the quality of the model is that only 30.8% of the cases of taking civic action were predicted correctly, while not taking action has been predicted fully. (see Table 1) This bias towards predicting the non-activism is a drawback of the model, but given a low share of the people involved in civic activism in the post-Communist countries a share of 30.8% does not seem too low. In our case here it is only in 288 cases out of 1408 remaining in the model that people declared taking civic action, which is slightly more than 20%.

Table 1

Observed	Predicted			
	Civic action			
		No	Yes	% Correct
Civic action	No	1120	86	92.9
	Yes	288	128	30.8
Overall %				76.9
-2 Log Likelihood	1524.873			
Nagelkerke R-sq	0.265			
Chi-Square	322.05 (Sig=0.0001)			
Hosmer-Lemeshow:	13.944 (Sig=0.083)			

Source: Classification Table from the output of SPSS model devised by author

At the same time, only 5.6% of the cases of trade union membership were predicted correctly. (see Table 2) The first general conclusion is that micro-level variables related to the personal traits of people fail to predict civic action and trade union membership to the

same extent. This means that two models do not have the same explanatory power in predicting both belonging to trade unions and having taken civic action. This means that the first expectation is not fulfilled. The models are clearly under-specified – macro-level variables can probably contribute to the better predictive power. Despite that Chi-square statistics are good and significant for both models, and Hosmer-Lemeshow tests of fit give insignificant results, we could hope for a better specification of the model with macro-variables.

Table 2

Observed	Predicted			
	TU Member			
		No	Yes	% Correct
TU Member	No	1145	14	99
	Yes	152	9	5.6
Overall %				89.8
-2 Log Likelihood	806.035			
Nagelkerke R-sq	0.292			
Chi-Square	242.83 (Sig=0.0001)			
Hosmer-Lemeshow:	12.664 (Sig=0.124)			

Source: Classification Table from the output of SPSS model devised by author

Results related to the meaningful variables are comprised in Table 3 below. The questions asked (and the meaning of the growth in code) are presented in the right column.

Table 3

IV's	Trade Unionism		Civic Activism		Question (meaning of growth of parameter)
	Sig.	Exp(B)	Sig.	Exp(B)	
age	0.0003	1.0381	0.0044	1.0179	Respondent's age (Older)
edulvl	0.002	0.6098	0.3397	0.9049	Highest level of education (More education)
eduyrs	0.0002	1.3427	0.0043	1.1607	Years of full-time education completed (more years)
working	1.6E-16	16.490	0.0113	1.5276	Respondent working or not (Working)
studying	0.0506	4.3838	0.0105	2.1272	Respondent studying or not (Studying)
netuse	0.7351	0.9846	0.0040	1.0926	Personal use of internet/e-mail/www (more time)
hinctnt	0.0312	1.1514	0.0870	1.0819	Household's total net income, all sources (Greater Income)

stfedu	0.6176	0.9746	0.0036	0.9026	State of education in country nowadays (More satisfied)
stfdem	0.0174	0.872	0.3073	1.0392	How satisfied with the way democracy works in country (More satisfied)
polintr	0.2832	0.8460	0.0024	0.7278	How interested in politics (Less interest)
clsprty	0.1731	0.7513	0.0114	0.6918	Feel closer to a particular party than all other parties (No)
vote	0.0049	2.1252	0.8573	0.9723	Voted last national election (Yes)
ipshabt	0.1571	0.8853	0.0074	0.8538	Important to show abilities and be admired (Less importance)
iprspot	0.0765	1.1515	0.0245	1.1326	Important to get respect from others (Less importance)
iplylfr	0.1774	1.231	0.0270	0.7885	Important to be loyal to friends and devote to people close (Less importance)
impenv	0.0025	0.6114	0.0607	0.8302	Important to care for nature and environment (Less importance)
pplfair	0.0141	1.1189	0.6856	1.0131	Most people try to take advantage of you, or try to be fair (More people are fair)
imueclt	0.7005	0.9785	0.0078	1.1085	Country's cultural life undermined or enriched by immigrants (Enriched)
ipmodst	0.1678	0.8806	0.0011	1.2127	Important to be humble and modest, not draw attention (Less importance)

Source: Table combined by author from the output of SPSS model built on data from European Social Survey 2002-2004.

Evidently, there are more variables that are significant in predicting civic activism. However, there are some factors that are valid for both dependent variables. I will group factors in three groups and will take a closer look at each one of those.

### ***Socio-demographic factors***

Factors that are significant for both dependent variables are age, years of education and whether the respondent is working or studying. A unit increase in age makes a respondent 3.8 percent more likely to belong to the trade union and 1.8 percent times more likely to have taken civic action. I would hesitate though to underline these similar results as the impact of age can emerge in different ways. Janusz Łankiewicz, a long-term member of Solidarity in Poznan, highlights the inertia in union membership by saying that “most of the [trade union] members are there because they were there” and relates this phenomenon to all the unions in Poland. (Łankiewicz 2007) For the NGOs, Jerzy Boczon, director of the Foundation

“Regional Center of Information and Assistance to NGOs” in Gdansk, highlights how the Polish NGO’s are clustered around certain age groups. In particular, despite the minor share of the NGO members from the youngest people, as they are “looking for other opportunities elsewhere” and especially so after the accession to the European Union, Boczon highlights that it is hard to establish a predominant age group, to which NGO members belong. (Boczon 2007) Comparing statements of Łankiewicz and Boczon highlights how dominance of older members in trade unions and NGOs has different roots – inertia in the first case and lower share of the young members on the other.

A more apparent characteristic of the Polish NGO’s, according to Boczon, is the high level of education of their members. According to his data, 42% of the people affiliated with Polish NGO’s have higher education while this is so only for 8% of the people in Poland generally. (Boczon 2007) Boczon’s conclusions are confirmed by findings of Klon/Jawor Association (2004; 2006) and my statistical findings. For example, data for the high educational level of the NGO members correlates with what is observed for the studying versus non-studying and working versus non-working people. A person enrolled in educational establishment is more than two times more likely to have taken civic action, which is more than  $\text{Exp}(B)=1.5276$  designating an time and a half increase of likelihood of civic action for working versus non-working people.

An interesting question is whether enrollment in the educational establishment also has an effect on the likelihood of belonging to the trade union. If one neglects a very slight insignificance of the results for the variable of ‘studying,’ the findings show that the studying respondents are more than 4 times more likely to belong to the trade unions than the ones who are not pursuing education. This is a decrease from the expectedly high figure of

Exp(B)=16.49, which demonstrates that a working person is 16.49 times more likely to belong to the trade union. Even though a figure for ‘studying’ is lower than for ‘working,’ it is still quite large and demonstrates a potential of such a union as *Niezależne Zrzeszenie Studentów* (Independent Students’ Union) or its autonomous regional branches for comprising younger members. A similar direction of influence of higher education on belonging to a trade union or taking civic action is further confirmed by a statistically significant finding, which shows that a unit increase in years of education makes respondent’s likelihood of having taken civic action 16 times greater while likelihood of belonging to the trade union becomes 34% greater. Moreover, this can signify a potential for unions’ recruitment at the educational establishments. However, given a lower likelihood of belonging to the union among the young people compared to the older ones, this recruitment might need to be done by very specialized unions.

An important question is whether these similarities in predicting trade union membership and civic activism through the levels of age and education have the same origins. In other words, can we assume that greater likelihoods of belonging to the union and having taken civic action for a more educated older and younger people are rooted in the same factors? I suppose that it is not so. First of all, educated people of any age start taking civic action because they are recruited into it through their networks. Involvement of the young people is aided by the internet use, which increases the likelihood of taking civic action by about 9 percent and is predominantly used by the young educated people. (Batorski 2005, 6) At the same time, the importance of the level of education in the case of trade unions can be attributed to the trend of downsizing the TU’s in the 1990s by excluding the low-skilled (and, correspondingly, less educated) workers. (Ost 2005) Another evidence of that is the significance of the growth in income for predicting TU membership – a unit increase along

the constructed grid of income leads to a more than 15 percent times increase in the likelihood of TU membership. This signifies that the source of having more educated people among civic activists is based on their recruitment while the same picture for the trade unions originates from excluding the less educated people. Chances of the trade unions to extend their membership to include the young people will depend on adopting better techniques of recruitment from the civic associations, and I will cover these and other attempts of learning below.

The first conclusion is that socio-demographic profiles of members of trade unions and social movements are different. There is very little evidence that would allow us to single out a particular profile of person belonging to a joint constituency of trade unions and social movements. Despite the statistical findings reflecting similar effects of educational level and age on the likelihood of civic activism and belonging to the trade unions, we should be careful to additionally consider the legacies that might have an impact. The only promising finding is that a group of highly educated and, at least the moment, older people comprise a constituency that can link trade unions and social movements. In this regard, Silver's remarks to consider the education industry and, specifically, a community of teachers as a potentially most important site of "labor unrest". (Silver 2003, 113 – 119)<sup>2</sup> Hardy's (n.d.) accounts of recent mobilization among teachers and nurses are also interesting. I will later consider whether there are signs of either overlapping recruitment or collaboration between trade unions and social movements involving such groups of people. I will now take a closer look

at the statistical findings for the importance of particular issues that are not specific for particular socio-demographic groups for predicting membership in a trade union and taking civic action.

### ***Specific public issues of joint contention***

European Social Survey included questions that aimed to measure people's satisfaction with state of affairs in several public spheres and an abstract subjective judgement on the quality of one's life. The overall finding is that levels of satisfaction with life in general, state of economy, national government or health system play no significant role in predicting belonging to a trade union or taking civic action. At the same time, satisfaction with the state of education is significant only for civic activism with  $\text{Exp}(B)=0.9026$ , which means that a unit increase in satisfaction makes the likelihood of activism almost 11 percent less. Moreover, this is related to the considerations I have expressed above about possibility for the education industry to become an area of collaboration between trade unions and social movements. This would, however, require getting trade union members interested in the state of education in the first place.

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<sup>2</sup> See also Ozga (1988), to which Silver refers to claim that teachers are proletarians.

At the same time, satisfaction with the way democracy works is significant only for TU membership with  $\text{Exp}(B)=0.872$ , which stands for a unit increase in satisfaction making the likelihood of union membership almost 15 percent less. This can be explained by the legacy of the unions acting as the agents of the democratic changes during the 1980s. A double capacity of the independent trade union Solidarity acting both as a trade union and a pro-democracy social movement allowed combining labor issues with general political matters. The situation has changed considerably several times since the end of the 1980s. A strong politicization of Solidarity culminated in 1996-1997 when Marian Krzaklewski created an alliance (Akcja Wyborcza Solidarność) of several dozens of parties under the umbrella of Solidarity. It is interesting that statistical findings characterizing the importance of satisfaction with democracy are based on the data for the time after 2001, when a decisive split finished a continuing separation of Solidarity and AWS. (Szczepiak 2002) At that time political alliance formed by OPZZ, the second major trade union, with SLD was still important but already in decline. (Jackson, Klich and Poznanska 2003; Avdagic 2004; EIRO 2005) It is important to note that union-party alliances were formed by the elite and such involvement of unions in politics reportedly went contrary to the interests of the trade unions' rank and file. (Ost 2005) Therefore, an importance of the democracy as a potential issue taken by the unions can be challenged. Doubts are confirmed if one considers two other related variables.

Such factors as interest in politics and strength of political affiliations are only significant for predicting civic action. For instance, a unit decline in interest in politics leads to a 37 percent decrease in the likelihood of civic activism ( $\text{Exp}(B)=0.7278$ ) and is not significant for predicting the trade union affiliation. Moreover, the same picture is observed for the strength of political preferences. Thus, having no strong affiliations as opposed to feeling closer to a



particular party makes a person almost time and a half less likely to take civic action ( $\text{Exp}(B)=0.6918$ ) and has no significant power in relation to belonging to a trade union. Therefore, lower satisfaction with the way democracy works is unlikely to have real outcomes on the part of the union members. Even though it is significant in predicting belonging to a trade union, these members do not seem to be interested in politics or develop strong affiliations with political actors. I would attribute the high role of evaluating democracy to the legacy of unions' politicization reinforced by inertia in membership. Moreover, Solidarity was acting as an agent of a pro-democracy political change.

A general conclusion is that no issues seem to connect members of trade unions and civic activists. Concerns with the state of education on the part of the civic activists is promising though since one of the largest and the oldest single trade unions in Poland is formed by the teachers (Związek Nauczycielstwa Polskiego). Despite findings of the importance of the evaluation of democracy for the union membership I have doubts that this signifies possibilities of collaboration. Involvement of union members in politics, if any, would most likely take traditional forms since the significance of voting in the last elections is valid only for TU membership with  $\text{Exp}(B)=2.1252$ , which means that those who have voted are more than twice more likely to belong to a trade union than the ones who have not. At the same time, civic activism, as it is measured by the ESS, reflects on the less traditional ways of political engagement. There is still a chance that some issues that are more of a personal nature and have not been covered as public spheres can attract attention of both civic activists and trade union members. I will attempt to evaluate that by taking a closer look at the findings related to respondents' personal values.

## ***Personal Values***

Another difference concerns personal value that are significant for predicting TU membership and civic activism. Such personal values as importance of showing abilities and getting respect from others are significantly linked to the likelihood of civic action while being only somewhat insignificant in predicting TU membership. A general conclusion is that there are no values that are significant for both trade unions and civic activism. It is another confirmation of our finding that constituencies of the trade unions and civic activism do not cross. I will now attempt to look for areas of potential collaboration in both procedural forms and specific issues.

Interestingly, a unit decrease in declared importance of demonstrating abilities makes a likelihood of having taken civic action 17 percent less. At the same time, a unit decrease in the importance of getting respect from others influences a likelihood of having take civic action in the opposite direction: it makes it 13 percent higher. The impact of maintaining peer connections is the opposite – a unit decline in the importance of being loyal to friends makes likelihood of civic activism 27 percent less. A focus on the self-realization in the personal, as opposed to the professional, sphere is apparent for civic activism – deriving satisfaction from applying one's abilities coincides with importance of maintaining peer connections rather than with attaining professional respect. This means that if closer connections between social movements and trade unions are aimed for, such techniques of the social movements as recruitment and mobilization through informal networks and providing rewarding experience in terms of personal respect and peer connections need to be applied for the trade unions.

In what has to do with particular spheres of action it is only importance of caring for the environment that is statistically significant linked to TU membership. A unit decrease in the

declared importance of caring for the environment predicts more than a time and a half lower likelihood of belonging to the trade unions. This means that a sphere of environmental activism seems to be an area open for collaboration between organized labor and social movements. Possibilities of such an alliance have been highlighted both in general theoretic discussions and for the cases of particular countries. (Norton 2004; Rose 2000; Obach 2004; Spencer 1995)

### ***Conclusions from Statistical Model***

To provide a general conclusion from the statistical model I will reiterate main findings and once again map out possible methods and areas of cooperation. The analysis that I have just conducted reflects on the characteristics of the persons, their attitudes and personal values and was supposed to uncover possibilities of joint membership. It can be concluded from the review of the model that trade union membership and civic activism cannot be predicted by the same set of micro-level factors related to personalities of the actors. Neither socio-demographic nor personal values or levels of satisfaction with specific public issues are able to predict both civic activism and belonging to trade unions. This means that such closest form of coalition between trade unions and social movements as joint membership seems highly unlikely at the moment. However, several joint groups of people are potential overlapping constituencies of trade unions and social movements. These are highly educated older people or those who are concerned with such issues as environment or education. In the subsequent chapters, where I will aim to explore forms of less close associations of trade unions and social movements, I will draw on the findings of this statistical analysis.

### CHAPTER 3: MODES OF UNION-MOVEMENT COEXISTENCE

In this chapter I will focus on several forms of coexistence of social movements and trade unions. I will first assess conditions that need to be fulfilled for cooperation of any kind to exist. This will be followed by the description of cases of permanent and discrete cooperation, learning and outsourcing. I will operate within the definition proposed by Frege, Heery and Turner (2003, 2) of social movement unionism, which reflects on the role of frequency of cooperation and highlights the importance of the common or shared goals in relation to specific issues, causes and constituencies.

The primary method for collection of the qualitative data used in this chapter is a series of semi-structured interviews with NGO experts and members and leaders of the NGOs and trade unions. Central categories for the questions were formed on the basis of the typology of the union-movement coexistence and questions were planned around these modes. I wanted to uncover overlaps of unions' and movements' constituencies, goals and repertoires. However, I did not make the interviewees aware of the typology following the suggestion of Wengraf that "theory-questions need to be distinguished from interviewer-questions." (2001, 61 – 62) Such two themes emerged after the first two interviews as 'the European Union structural funds' and 'the foundations formed by the trade unions.' These were covered during all of the meetings that followed. In total, 14 interviews were conducted in Warsaw, Gdansk and Poznan in April 2007, most of them in Polish. In addition to the materials of interviews, I will also rely on the previous research of the NGO sector.

#### ***Preconditions for Cooperation***

It is necessary to formulate and survey several preconditions of cooperation in general. First of all, parties of potential cooperation need to be open for contacts and coalitions. I see this

interest originating from an overlap in stated or de facto assumed goals, repertoires and, though not necessarily, constituencies. As the statistical model in Chapter 2 shows, few apparent connections were discovered between trade unions and civic associations in terms of shared values or engagement with particular public issues. At the same time, older educated people seem to be the only joint constituency. Before I turn to evaluating permanent and discrete collaboration, I will devote more attention to assess and explain a degree of openness of the parties.

The picture looks pessimistic if one listens to the experts' assessments of the existing connections. Jerzy Boczon, a civil society expert and a community activist with more than 20 years of experience, sees few existing interactions, and highlights how – even if trade union members participate in NGO events – they typically do not represent workers' associations. (Boczon 2007) Even occasional engagement of individual trade union members in NGO activities seems to be a rare case. However, this should not be attributed solely to trade union members assigning low value to their possible involvement. It is also the case that NGO's and informal associations are not open for representatives of other organizations. The most recent study of the 'third sector' in Poland conducted by Klon/Jawor highlights that one third of the associations do not have contacts with any other actors of civil society, while most frequent contacts were reported with representatives of the local authorities (added to 63%, who declared permanent or frequent relations, 16% of organizations reported sporadic contacts), local communities (85%), public institutions (77%) and local media (50%). (Gumkowska and Herbst 2006, 9) These frequent contacts with many actors do not replace inter-organizational relations within civil society, and non-governmental organizations as a whole can be described as closed. However, such assessments of civic associations tend to

evaluate them as a whole and rarely take a close look at the differences between sub-groups of these associations.

Moreover, NGO experts tend to evaluate even trade unions in their totality. Jerzy Boczon puts it bluntly: “parties are parties, trade unions are trade unions and civic associations are civic associations” and sees this distinction as the ultimate cause for the absence of interaction. (Boczon 2007) Even though the experts see trade unions operating in a completely different realm than social movements or political parties, the opinion of the rank-and-file is that trade unions are another kind of social movements. (Łankiewicz 2007) However, when talking about the role of the trade union leaders, Łankiewicz expresses a common view among the interviewees that the union leaders understand the primary goal of trade unions as to “work for their members and try to settle their problems,” and it is because of this view of the leaders that trade unions are “closed [and] don’t open . . . to all people.” (Łankiewicz 2007; Piechocki 2007; Uziak 2007) A divide between the rank and file and the leaders in understanding the nature of the trade unions is apparent. However, it is only so for the large and established trade unions. For instance, Zbigniew Marcin Kowalewski, a labor organizer closely affiliated with a radical-left branch-out of Solidarity ‘August’80’, says that “‘August’80’ wants to work outside the enterprises [on] the social problems.” (Kowalewski 2007) In my view, this perception of the large trade unions by their leaders as independent powerful actors is a legacy of their politicization of the 1990s, when support of the unions was often crucial for political parties. Kazimierz Schreiber, the leader of OPZZ in Pomorski region of Poland, highlights that a tendency for perceiving itself as a strong and independent actor is especially pronounced for unitary trade unions as opposed to the ones formed as confederations. (Schreiber 2007)

Schreiber's words should be taken with a certain degree of skepticism – after all, OPZZ is a long-term rival of Solidarity. It is especially so in Pomorski region – the birthplace of Solidarity. However, Mariola Żarnoch, leader of the Antimobbing Association operating nation-wide (Ogólnopolskie Stowarzyszenie Antymobbingowe OSA), is hesitant to put OPZZ and Solidarity in the same category. Leaders of OPZZ seem to be more open to contacts with social movements than Solidarity. This can be attributed both to decentralized structure of OPZZ and its history of being primarily a minor partner in union-party political coalitions and now having to regain legitimacy.

Schreiber's views are confirmed by Żarnoch, who urges “not to confuse Solidarnosc with the union.” (Żarnoch 2007) She goes on to connect the lack of attention of the union leaders to the needs of the members to that in the 1990s Solidarity “has been a political force and had nothing in common with the union activism – this has been a political activism.” (Żarnoch 2007) Even now, she says, “Solidarity is a political union, not a trade union. It is called a ‘trade’ union but it is not... it is not acting in the sphere of protecting the labor rights. In the sense, it is not doing so directly.” (Żarnoch 2007) Dr. Waldemar Uziak, the head of the Legal Department of Solidarity, also confirms that, even though the links of Solidarity with political parties are now much weaker and of a different nature than before, individual leaders of the union still have political ambitions. (Uziak 2007)

The legacy of unions' politicization found reflection in the interviews with NGO experts as well. Lidia Kołucka-Żuk, Program Director for Poland and Slovakia of CEE Trust, attributes any involvement of the trade unions into welfare projects “out of their traditional [constituency]” to their desire “to campaign for the next political jump.” (Kołucka-Żuk, 2007) She also claims that many other NGO leaders have the same reservations. She

concludes that communication between NGO's and trade unions, the most important composite of strategic and occasional cooperation as well as of the process of learning, "is harmed by the history of [unions'] politicization." (Kołucka-Żuk, 2007)

To summarize, there is little hope for active collaboration between trade unions and social movements. First of all, openness of both NGOs and large trade unions to the contacts with other actors is very low. Only small trade unions declare the interest in collaboration with civic associations. However, it would be reasonable to expect that their radical stance might damage their chances of forming coalitions with non-radical social movements. A divergence of the methods (repertoires of contention) of the small radical trade unions and social movements decreases the chances of their collaboration, despite the fact that these unions are ready to engage in action beyond the enterprises. Secondly, large trade unions seem to suffer from the history of their politicization. Apart from bearing ideological labels, both OPZZ and Solidarity are often questioned by the civic associations in their motivations. An overlap in goals of the large trade unions and social movements might exist but fails to be recognized because of the unions' involvement in politics in the past. It is especially so for Solidarity, which played the leading role in the union-party coalition. The perceived gap in goals is less pronounced for OPZZ, which gives more flexibility to the smaller unions belonging to its loose confederation structure. I will now take a closer look at the cases of cooperation so that to analyze opportunities and threats of this mode of union-movement coexistence in greater detail.



## ***Cases of Permanent and Discrete Cooperation of Trade Unions and Social Movements***

Permanent cooperation requires somewhat more strict conditions. Most importantly, goals, methods and, possibly, constituencies of the cooperating parties need to correlate for a longer period of time. In this regard, perceptions of a distinct nature of trade unions and social movements and legacies that complicate communication are not the only reasons for trade unions and social movements to interact rarely. I see another source of the lack of cooperation on a permanent basis in two factors: first of all, a great number of civic associations operate within short-term projects and, secondly, many organizations move into particular spheres for the purpose of seeking short-term benefits. As the authors of the research of NGO sector highlight, for a half of the organizations working through the projects the longest project in the last two years took not longer than 10 months. (Gumkowska and Herbst 2006, 25) This is by far not enough for the long-term cooperation to emerge and gain strength. In this regard, it is not surprising that projects described by the experts as successful typically have a longer time scope. However, most of the cases praised by the interviewees involved experts and had to do with attracting pro bono services that the trade unions or the employees could not afford otherwise.

A program run by the Helsinki Foundation in Poland is a notable example of long-term activities involving trade unions, civic activists and experts. The Precedential Cases Program is well-known for the litigation processes it has assisted with. The most famous case is the “Bożena Łopacka versus ‘Biedronka’,” which brought labor disputes from within Polish supermarkets to the courts. In January 2007 the district court of Elbląg announced a final decision anticipated by many since 2003. According to the court ruling, Bożena Łopacka is entitled to PLN 26,000 as a compensation for the overtime hours that she has worked for

“Biedronka” in 2000 – 2002. Lidia Kołucka-Żuk, Program Director of CEE Trust, claims that apart from serving as a precedent for similar cases, this litigation contributed to the formation of a more active stance of the unions in the hypermarkets. She is sure that it was this particular case that highlighted the possibility of connections between civic associations and trade unions in the sphere of legal advice and litigation. What is especially interesting is how Kołucka-Żuk sees civic associations as the main force in such alliances being followed by the trade unions. (Kołucka-Żuk 2007) Indeed, representing workers in courts could (even in the most optimistic case) empower workers without involving trade unions. In addition to the Precedential Cases Program, the Helsinki Foundation also conducts educational activities, which aim to raise awareness of the labor rights’ violations specifically among unionized workers and union leaders. An important feature of the Helsinki Foundation is that it does not involve members and serves as an external provider of experts and legal services.

The close cooperation between labor groups and civic associations need not necessarily involve experts and is observed in another type of projects that extend for longer than 10 months. These are activities sponsored by the European Social Fund, which aims to deal with the issues of unemployment and return excluded groups to the labor market. Touching upon social and economic rights, labor issues attracted attention of many NGOs and civic association operating in other spheres when the funds became available in 2004.<sup>3</sup> Association

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<sup>3</sup> A total of Euro 12.81 billion was to be transferred to Poland after May 1st, 2004. (European Commission 2004) Interestingly, these funds can only be allotted to NGOs that meet strict criteria and trade unions, despite their declared involvement in the issues related to unemployment, are not eligible to receive funding. However, unions’ participation in the projects is always stimulated by the NGOs. (Biernacka 2007)

“Barka” in Poznan is a good example of an NGO tackling issues directly related to the consequences of the layoffs at the main enterprises in Poznan. A close cooperation between “Barka” and a non-profit organization “Centrum Ekonomii Społecznej” (Center of Social Economy – CES) contributes to these efforts and makes it possible to tackle labor issues while considering the interests of the community at large. Both “Barka” and CES enjoy funding from the European Social Fund and direct most of their efforts to developing social enterprises, in which current or former trade union members often take part. These are small organizations that employ at least 5 people, participate in the open market interactions and enjoy protection from the government as they contribute to the public benefit by employing and socializing previously excluded individuals. They present an interesting case of cooperation between authorities, businesses and civic organizations. This cooperation involves trade union members. Jerzy Boczon considers social enterprises not specific actors between the NGOs and trade unions but rather a mechanism capable of linking labor organizations at specific enterprises with civic associations. (Boczon 2007) Currently, there are few grounds to call it a cooperation between unions and movements. At this stage civic associations are involving separate members of the trade unions in their activities. Moreover, social enterprises have been developed with an assistance of European Funds, which has its own drawbacks. First of all, most of the funds for social enterprises were allocated through the project EQUAL, which will only be implemented until 2008. The experts conclude, that, at least under project EQUAL, little has been done to foster long-term collaboration between trade unions and NGOs. (Kołucka-Żuk 2007) Secondly, most of the civic associations participating in the projects related to the social economy did not withdraw from their original activities and treat the projects financed by the European funds as supplementary to their main field of engagement. (Sadowski 2007; Boczon 2007)

This means that, despite the fact that cooperation between civic groups and trade unions lasts a considerable amount of time, there are few grounds for calling it a long-term partnership or a permanent cooperation. At the moment it is more a tactical cooperation supported by such opportunities from the environment as the availability of financial resources of the EU or other associations (Helsinki Commission). Not all the chances of the long-term partnership are lost though; the European Social Fund aims to tackle issues related to unemployment, equal opportunities at work and developments of skills until 2013. In relation to this it specifically calls for a more active partnership between employers, trade unions and civil society. (European Communities 2007) A second round of allocation of European structural funds presents another opportunity for trade unions to form permanent cooperation with civic associations. At the moment, cooperation between trade unions and social movements can be characterized as discrete or sporadic.

Discrete cooperation is opposed to the permanent one primarily by the shorter duration and lower frequency of the interaction. Consequently, goals, methods and interests of the cooperating organizations need not be as close as for the permanent cooperation and can overlap occasionally. Lidia Kołucka-Żuk describes how these alliances arise as “ad-hoc coalitions” and highlights how they can be easily broken and built anew every time interests of the parties change. (Kołucka-Żuk 2007) Ewa Biernacka, President of the ZNP (Teachers Union) in Gdynia, describes occasional meetings as the main kind of interaction that the teachers trade union has with civic associations. These occasional meetings primarily happen during the educational activities that ZNP organizes for its members together with civic associations. Biernacka distinguishes ZNP from other unions by highlighting how it manages to “protect the interests of the non-members as well” and uses this to explain why non-member teachers are invited to such educational seminars. (Biernacka 2007) There are

almost no signed contracts, even though she sees financial value in cooperation with NGOs, which primarily comes from European structural funds – Biernacka gives examples of ZNP cooperating with local NGOs in Słupsk under projects sponsored by the EU. She claims that the head office of ZNP in Warsaw is urging the local branches of the union to build coalitions with the NGOs and to especially focus on those, which are capable of fundraising from the EU. At the same time, Biernacka warns that any cooperation requiring financial involvement of the union or its members is very unlikely. The situation is strikingly different for Solidarity – the only cooperation Dr. Uziak remembers is involvement of Solidarity in community activities as a sponsoring agency. (Uziak 2007)

A still very different account of the openness to cooperation with NGOs is given by Zbigniew Marcin Kowalewski, a member of Solidarity in 1980 and one of the founders of the radical-left Committee for Assistance and Protection of Repressed Workers (Komitet Pomocy i Obrony Represjonowanych Pracownikow – KPİOPR). Kowalewski describes KPİOPR as a group that is “trying to work in more and more fields” and adds: “we are open to any group of people who, for example, want to join our committee or to establish collaboration; loose collaboration or process collaboration – all possibilities are open.” (Kowalewski 2007) It is, however, the weakness of such small trade unions and labor groups as KPİOPR that prohibits them from forming relations with civic associations. For example, Jerzy Boczon admits that he has not heard of the actions organized by any of the small radical trade unions. (Boczon 2007) Not surprisingly, Kowalewski vividly demonstrates the absence of any communication by confirming that neither he nor his colleagues in KPİOPR or August’80 “know the life of NGOs.” He goes on to admit that he personally has “never observed an activity [of an NGO] or that they are appearing in places.” (Kowalewski 2007)

To conclude this discussion of the possible ways of union-movement cooperation, I will highlight that there are two possible mechanisms that bring divergent goals of unions and movements closer. The first one – cooperation with the experts of the NGOs – makes union the minor party in the coalition, which makes them less capable of turning benefits of cooperation into political dividends. This would bring the goals of the unions and the movements in greater accordance. The second mechanism relies on EU structural funds and will become even more promising for strengthening union-movement cooperation if the funding agencies call for this. EU-sponsored cooperation can involve both small and large trade unions and requires only a certain degree of openness to cooperation based on the overlapping constituencies and a proximity in methods of operation.

The chances of the unions becoming partners of NGOs in EU-sponsored projects can increase if they adopt practices of the civic associations. Kowalewski is convinced that there are a lot of practices that KPiOPR could adopt from the NGOs and civic associations. In this position he is similar to the leaders of the large NGOs. (Uziak 2007; Ostrowski 2007) I will now take a close look at whether trade unions are learning specific practices from the NGOs and civic associations.

### ***Learning by the Trade Unions from Social Movements***

As Drinkuth, Riegler and Wolff highlight, several recent structural changes are conducive to a greater learning on the part of the trade unions, who are usually considered very inactive in responding to changes. (2001) Among these trends the authors especially highlight unions' losing members and "moving the regulation of working conditions from the sectoral level down to the company level." (Drinkuth, Riegler and Wolff 2001, 448) What the authors describe as changes for the Western Europe is reality in Poland. I will leave aside Drinkuth,

Riegler and Wolff's convincing argument that unions can contribute more to the learning of the organizations, where they are formed. In this research I am not interested in whether the unions influence the management to keep up-to-date with changes in managerial or technological techniques. Instead I will now attempt to follow Drinkuth, Riegler and Wolff's (2001) second thesis that unions themselves can become more prone to act as learning organizations. I will first assess whether experts, leaders or members of the unions and civic associations recognize a need for learning and will then look at what exactly the unions are learning from civic associations and at the specific ways, in which they are doing it.

Views of trade union leaders and members and NGO experts on the necessity of unions to learn from civic associations are very different. While Lidia Kołucka-Żuk is convinced that trade union can learn a great deal from NGOs, Dr. Uziak sees almost no spheres where learning is possible. (Kołucka-Żuk 2007; Uziak 2007) Boczon attributes lack of learning (or of desire to learn) on the part of the unions to the legacies of their elitist stance during the years of political activities and, at the same time, highlights how rigid and old-fashioned the large unions are in their methods of work. (Boczon 2007) A sharp distinction between small radical and large unions is visible in the perception of the importance of learning. According to Kowalewski, KPİOPR and August'80 consciously adopt techniques of the social movements in recruitment and fundraising through awareness-raising, communicating in non-traditional ways and relying heavily on the support of the people, who associate themselves with these organizations without formally belonging to them. (Kowalewski 2007)

In doing so, Sierpen'80 and KPİOPR follow advice of Lidia Kołucka-Żuk, who sees a great need for the trade unions to learn "how to communicate with the society through professional social campaigns" so that "to inform the society about their activity and to build a

constituency.” (Kołucka-Żuk 2007) Restraints for organizational learning in the sphere of communication become more apparent if we notice that by ‘communication’ experts mean communicating the position of the unions to the external actors. In this regard, desire of the leaders of large unions to only focus on the needs of the members seems to make learning to communicate in this way useless. A tendency of the large unions to restrain alliances to the level of elites and such public actors as political parties also deems communicating with broad public unnecessary. It is only for the small unions that awareness raising gets translated into constituency-building or fundraising. Though largely behind in what concerns applying practices of NGOs in their own activities, large trade unions are developing the organizations closely affiliated with them to make use of specific techniques utilized by civic associations. Creation of separate organizations is the way that large trade unions choose to fundraise and communicate.

Two foundations have their offices in the same building with the national headquarters of Solidarity in Gdansk – “Foundation for Promotion of Solidarity” and “Foundation Center of Solidarity.”<sup>4</sup> According to their statutes, both foundations promote the activities of Solidarity and communicate its goals to the general public. Additionally, both are registered as ‘Public Benefit Organizations,’ which allows them to fundraise from individuals and public funds. Lidia Kołucka-Żuk describes the main feature of these foundations as being “able to fundraise from the sources closer for trade unions.” (Kołucka-Żuk 2007) Wojciech J. Kwidziński, a member of the Board of “Foundation for Promotion of Solidarity” confirms



the views of Kołucka-Żuk and adds that, in general, “it is a foundation started by the trade union so that it would be doing things that the trade union cannot be doing ... for which NGO fits better.” (Kwidziński 2007)

Apart from fundraising domestically, these foundations are eligible to apply for structural funds that became available for Poland after its accession to the European Union. Some of these funds are allocated to projects dealing with issues of long-term unemployment and returning the low-skilled people to the labor market. OPZZ is actively cooperating with a legally independent foundation over these particular issues. Interestingly, this “Foundation for Realization of Social Projects”<sup>5</sup> (FRSP) is located in the same building as OPZZ. FRSP is currently running two projects sponsored through the European structural funds. One of these projects of FRSP aims to train staff of the trade unions in working with the unemployed and openly declares its interest in training the workers of OPZZ.

In setting up such foundations large trade unions follow the recommendations that NGO experts would give them. Fundraising for specific projects is one sphere highlighted by the experts as important for learning. (Boczon 2007; Kołucka-Żuk 2007) Evidently, however,

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<sup>4</sup> “Fundacja Promocja Solidarnosci” and “Fundacja Centrum Solidarnosci.”

<sup>5</sup> “Fundacja Realizacji Programów Społecznych”

this emergence of the foundations is less about learning the techniques than using the emerging opportunities. Operating under legal constraints, the large unions make organizations closely affiliated with them adopt practices of the civic associations. Nevertheless, one could be rather critical of the unions pragmatically adopting only practices related to attracting financial resources. Communication aiming to recruit new members or efforts to fundraise domestically is not sufficiently attended for.

Therefore, there are little grounds to say that union revitalization through learning from the social movements is possible at the current stage. The unions tend to use the practices, in which the movements are more advanced, to pursue goals that are distant from the interests of the workers. I relate this to the fact that the leaders of the large unions are not dependent on recruiting new members or promoting the union. This results in a poor recognition of the dire situation, in which the unions are by now in terms of membership and influence. The situation is different for the small unions, which display a great deal of initiative in seeking and applying methods of social movements to be more effective in recruitment and promotion. Installing foundations within the unions is the project of the elites and has very little to do with the rank-and-file. Leaders of OPZZ display greater proximity to the needs of the rank-and-file as a foundation affiliated with the union runs projects related to the needs of the unemployed. At the same time, Solidarity fails to relate activities of its foundations to the interests of the workers and is obtaining financial resources for the purposes the leader of the foundation declined to reveal or comment on. (Kwidziński 2007)

## ***Cases of Trade Unions Outsourcing their Functions or Ignoring the Social Movements***

Forming NGOs within the structures of the unions is not the only way, in which trade unions can have some of their functions performed by NGOs. I will discuss in this section how trade unions choose to move out of specific areas of action and leave those to civic associations. I will distinguish between active and passive outsourcing based on whether trade unions leave specific areas unattended with (active outsourcing) or without (passive outsourcing) recognizing that those will be taken over by particular NGOs. Active outsourcing presumes greater contacts of trade unions with civic groups and some form of agreement on transferring functions from the trade unions. An overlap in constituencies and goals of the unions and NGOs is required for the active outsourcing to happen. An overlap just in constituencies makes passive outsourcing more likely. In this regard, passive outsourcing lies close to trade unions ignoring the existence and involvement of NGOs in spheres of unions' activities. A distinction between active and passive outsourcing puts different weight on unions' ability to maintain contacts with civic associations. Thus, it would be logical to expect those trade unions that maintain communications with the community activists to be more prone to outsource actively. I will now give examples for each of these modes of union-NGO coexistence and will later summarize my findings.

Both goals and constituencies of the unions are reflected in their statutes. One of the constituencies, which unions are expected to be involved with, are such people as the working women and the youth, who need special protection in the labor market. Moreover, such disadvantaged groups as the disabled, the homeless, former prisoners or drug addicts need special assistance not only where they are employed but also in finding jobs. According to the Statute of Solidarity, the goals of the trade union include opposing the unemployment,

assisting the unemployed members and acting for the benefit of the disabled people requiring special assistance. (Statute 2007) Another goal stated by the major trade unions of Poland is provision of the legal assistance to the members.

Dr. Uziak's assurance that Solidarity is coping with all of these tasks (2007) is not shared by the NGO experts and activists. For example, Boczon highlights how people from the disadvantaged groups do not hope to get assistance from the unions and need to be taken care of by the NGOs. He highlights that very often these particular people were not protected by the unions at the times of mass layoffs and early retirements. (Boczon 2007) Piehocki expresses the same doubts but sees a chance of involving the trade unions into working with such constituencies through the attractive European funding. So far, he sees only the small radical left-wing trade unions as the ones actively voicing the concerns of the least advantaged. (Piehocki 2007)

Żarnoch also reflects on the passive stance of the unions in relation to the legal assistance to the members. She claims that it is primarily OPZZ that recognizes a need of legal advice to the rank-and-file but even they lack resources to provide it. (Żarnoch 2007) When asked about the place of legal assistance among the services provided by the unions, Kowalewski admits that sometimes this is the crucial help that the workers need and speaks at length on how the large unions prefer not to get involved in this potentially conflict-provoking sphere. The main reason for this is the reluctance of the union leadership to let go of the major mechanisms it has in its hands now – by representing workers at all levels, the unions manage to avoid conflicts with management of the enterprises. According to Kowalewski, legal advising is empowering the workers themselves and this goes contrary to the strategy of conflict-avoidance that the large unions pursue. (Kowalewski 2007) In my view, the remarks

by Kowalewski are largely accurate but relate more to the unitary union of Solidarity than to the much more loose confederation of OPZZ. Indeed, representation of OPZZ members happens at the more levels than in Solidarity and benefits of involving legal experts can be better grasped by the union leaders at the lower levels.

August'80, co-led by Kowalewski, presents a case of a union willing to cooperate with NGOs. Kowalewski displays recognition of an overlap of unions' and NGOs' constituencies and goals. He also recognizes limited abilities of his union to reach these goals. When talking about possibilities of working together with Żarnoch's Ogólnopolskie Stowarzyszenie Antymobbingowe OSA in Gdansk, he has in mind exactly what I have labeled as active outsourcing when saying "we want to establish a contact with this NGO and ask them 'If people arrive to our committee asking for aid on the problem of mobbing, can we address these people, send this people to you? . . . because you are specialized in this, you have experience and our lawyers are not very experienced.'" (Kowalewski 2007)

A similar position is expressed by Piotr Ostrowski of OPZZ, who admits that "there are so many problems that we cannot manage all of them" and goes on to say that "it is good for the democracy that such NGOs exist and fill the gap of those problems that cannot be solved by the trade unions." (Ostrowski 2007) Nevertheless, Ostrowski's focus is more on the NGOs assisting the trade unions rather than overtaking unions' activities in some spheres. The range of spheres he lists for the NGOs to "fill the gaps" in includes legal advising, antimobbing and, surprisingly, political or anti-war actions. A focus on political activities comes up contrary to Ostrowski's assurance that OPZZ has withdrawn from politics. It is more likely that the union officials expect to gain leverage in the political action by aligning with social movements.

As I have mentioned above, Dr. Uziak openly admits that personal political ambitions of the leaders of Solidarity are still present and it is to this that Żarnoch attributes the low willingness of the union to participate in the causes at the lowest level. She gives an example of a situation in Szczecin, where the case of three mobbed workers – some of them belonging to Solidarity – was brought to court by OSA. Żarnoch claims that it was a great publicity, which the case offered, that made it possible for OSA to make the local branch of Solidarity to cover the legal expenses of the workers. Generally, she says, it is hard to count on the assistance of the unions and claims that Solidarity has not been “functioning since the beginning of the 1990s.” (Żarnoch 2007)

Similarly, Boczon gives an example of Solidarity not being interested in events that don't offer direct publicity to the union. A celebration of the annual awards to the best NGOs of the region was held at the Gdansk Shipyard in 2005, the year of the 25th anniversary of Solidarity. Despite attention given to the event by such a high national official as the Ombudsman for Citizen Rights, Solidarity chose to virtually ignore the celebration and was represented by “some 5th person in the ranking.” (Boczon 2007)

### ***Concluding Remarks on the Modes of Union-Movement Coexistence***

Several conclusions touch upon all modes of union-movement coexistence discussed in this chapter. The first factor is the legacy of union politicization. Civic associations often question the goals and motivations of the union leaders when those get involved in social movement unionism. Considering that the NGOs are and almost never were involved in politics in Poland, legacy of union politicization impedes the collaboration. It also has an impact on the position of union leaders. Perception of the unions of themselves as strong and

independent actors seems to still prevail among the leaders of Solidarity. This attitude is to a lesser extent displayed by the OPZZ leaders – even seeking alliances with social movements is sometimes tied to the ambitions of political involvement of the union. Greater proximity of low-level union leaders to the rank-and-file brings goals of the lower-level unions and social movements into greater accord. Smaller trade unions display an even greater openness to cooperation with the social movements.

Linked to the legacy of politicization is the tendency of the large unions' leaders to view interests and goals of the union in general separately from the interests of the constituencies or members. This has an impact on the processes of learning and outsourcing. The foundation linked to OPZZ displays focus on the needs of the rank-and-file and the union using this NGO for educating the union staff in working with the unemployed. Foundations affiliated with Solidarity are not aiding the union to advance in any direction conducive to union revitalization. Similarly, large unions seem to be outsourcing some of their functions to raise overall effectiveness. Large unions are more active in attracting assistance of the social movements when there is a direct benefit to the union in general rather than to the interests of the actual or potential members. When interests of the unions in general and their members do not overlap, the labor organizations can choose to ignore even those social movements that are assisting unions' constituencies.

The second factor is the role of such sponsoring agent as EU in making forms of union-movement coexistence more conducive to union revitalization. At the moment the only cases of union-movement active and prolonged cooperation between trade unions and social movements touch upon such issues as legal advice, representation in court and training in litigation and involve expert-based NGOs. Cooperation through EU-funded centers of social

economy and social enterprises currently involves only trade union members while the leaders of labor organizations are passive. Importantly, the social movements are now capable of fulfilling the requirements of the European funding agencies by acting on labor issues without coordination with trade unions. European Union bodies can promote more active union-NGO collaboration by emphasizing its importance while allocating assistance during the second round of European funding (2007 – 2012). European structural funds can stimulate union revitalization by requiring more active cooperation between NGOs and trade unions. Moreover, this can be done in the manner that would make cooperation attractive to the union leaders though keeping the unions from the leading position in a union-movement coalition. European financial assistance is very potent in making interests of the unions' leaders correlate more with the interests of the rank-and-file.



## CONCLUSION

In this thesis I aimed to uncover signs of revitalization of the Polish trade unions through them forming coalitions with social movements and, most generally, adopting a model of social movement unionism. Currently there are few indications of revitalization of organized labor through social movement unionism in Poland. The statistical model that I have devised demonstrated great differences in personal traits of the union members and civic activists. The only group that displays proximity to both civic activism and trade union membership is that of the older educated people. In this regard, teachers present an interesting constituency. The only personal value capable of predicting both union membership and civic activism is the importance of the nature and environment. This reflects the popular discussions of labor-environmental coalitions. In general there seem to be few opportunities for the unions and social movements to have their social networks overlap.

Similarly, connections between trade unions and social movements are rarely conducive to union revitalization. No cases were discovered when trade unions and social movements display the same such three characteristics as goals, constituencies and methods/repertoires. Even in cases of the closest union-movement mode of coexistence – permanent cooperation – connections are limited to unions receiving assistance from expert-based NGOs. Occasions of discrete cooperation under EU-sponsored projects can also become more regular and better linked to union revitalization. For this to happen, European funding agencies need to require more active collaboration of NGOs and trade unions over joint constituencies. Making the NGOs chief partners in the coalitions can make the unions learn from social movements to target particular interests of the union members rather than pursuing the goals of the union in general. Focus on the needs of the union members is also impeded by the divide between the unions' elites and the rank-and-file, which has its roots in the unions'

politicization during the 1990s. It impacts position of unions in several ways. First of all, NGOs still seem wary about motives of the unions' involvement in community activism. Secondly, leaders of the large unions tend to perceive their organizations as strong and independent actors. Thirdly, legacy of unions forming alliances as single actors makes union leaders think of the interests of the unions in general instead of focusing on interests of the individual members. Not all the unions are equally affected by the legacies of politicization and display similar attitudes to coalitions with social movements.

I see small radical trade unions as the most successful in being engaged in social movement unionism. However, these small unions lack resources to be important actors. OPZZ, which is less involved in social movement unionism than the small unions, is still suffering from its political engagement but is benefited by its structure of a rather loose confederation. Solidarity is engaged with social movements less than all other trade unions and seems to be hurt by its unitary structure and the greatest engagement in politics in the past. A generational change within the union leadership looks promising. However, personal ambitions of the union leaders might continue even after such change occurs.

Overall, I have discovered few signs of union revitalization through labor organizations building coalitions with social movements or social movement organizations. At the same time, operating within a pluralist system of industrial relations, the unions can hardly rely upon bodies and mechanisms of collective interest representation. Moreover, there are few hopes that unions are now actively setting firmer grounds by forming coalitions with community actors or social movements. Conclusions regarding prospects of union revitalization through social movement unionism in Poland are rather pessimistic at the moment.

Further research is needed to address two connected questions. First of all, what are the issues that touch upon the interests of the union members and can be addressed by the social movements? Secondly, what are the factors impeding or promoting cooperation between trade unions and social movements over those issues? Answering these two questions can help us achieve two goals: it can uncover connections between servicing union members and building coalitions with social movements, and, secondly, clarify how to make these connections visible to the leaders of unions and social movements. As for now, though, good practices are few and typically involve smaller and weaker unions. The continuing desire of the large unions to rely on their own eloquence keeps them from recognizing the benefits of coalitions with social movements. Ironically, the members of the large unions might even win from their labor organizations recognizing their weakness. However, there is a risk that by the time it happens there will be too few union members left to benefit from union-movement coalitions.

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